3/21/89 SG&LS-2

FEBRUARY 1989

OREGON LABOR TRENDS

—W.E. Hunter, Administrator • State of Oregon • EMPLOYMENT DIVISION • Department of Human Resources—

INDICATORS

UNEMPLOYMENT RATE

Oregon (Seas. Adj.)

Jan.	1989	5.1
Dec.	1988	5.1
Jan.	1988	6.0

United States (Seas. Adj.)

Jan.	1989	5.4
Dec.	1988	5.3
Jan.	1988	5.8

WAGE AND SALARY EMPLOYMENT INDEX

Oregon (1977=100)

Jan.	1989	126.5
Dec.	1988	125.7
Nov.	1988	125.4
Oct.	1988	124.6
Sept.	1988	123.7

PRODUCTION WORKER AVERAGE HOURLY EARNINGS

Oregon

Dec.	1988	$10.77
Nov.	1988	$10.72
Dec.	1987	$10.71

PRODUCTION WORKER AVERAGE WEEKLY HOURS

Oregon

Dec.	1988	40.2
Nov.	1988	39.2
Dec.	1987	39.3

CONSUMER PRICE INDEX (CPI)

1982-84=100
ALL URBAN CONSUMERS

Portland-Vancouver

July-Dec. 1988	115.9
Yearly change	3.6%
Annual Average 1988	114.7
Yearly change	3.4%

United States

Jan. 1989	121.1
Yearly change	4.7%
Annual Average 1988	118.3
Yearly change	4.1%

Portland Hotline 221-4132

OREGON ECONOMY OUT-PERFORMING U.S.

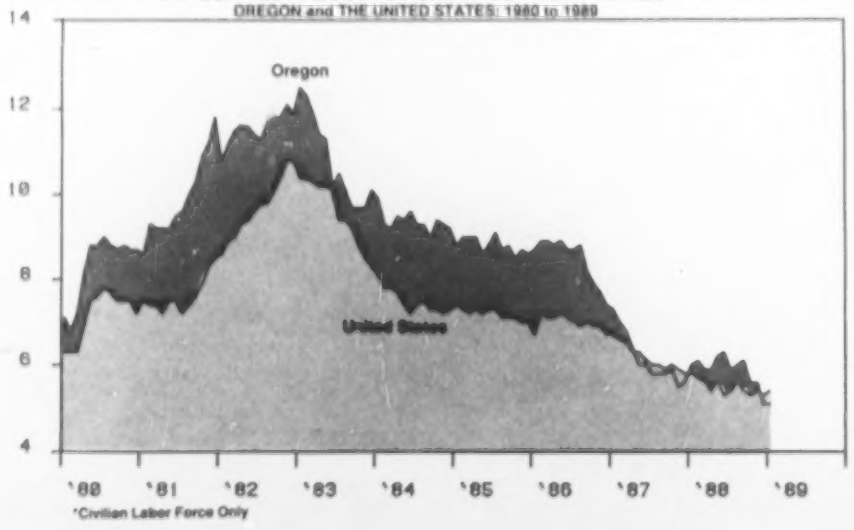
Dick Kuczek

January was the first month in which Oregon's unemployment estimate was generated using the new regression methodology (see the December 1988 **Oregon Labor Trends** for an explanation of the new estimating methodology). Regardless of the methodology used, however, we see again that Oregon continues to enjoy a lower unemployment rate (seasonally adjusted) than the nation. Oregon's seasonally adjusted unemployment rate in January was 5.1%, the same as the previous month. The U.S. unemployment rate for January was 5.4%, up 0.1 from December's 5.3%. Normal seasonal trends dictated a fall off in employment levels in January, and this did indeed occur. Total employment fell by 17,100 in January, while the number of unemployed Oregonian's rose by 9,600. Nonfarm wage and salary employment declined by 25,500 from the previous month. These changes were somewhat less than expected as indicated by the gain in the nonfarm wage and salary employment index, which climbed to 126.5 from December's 125.7.

Comparing this January with January 1988 shows how impressive our state's economic performance has been over the last year. January 1988 saw a seasonally adjusted unemployment rate of 6.0%, almost a full percentage point above the current rate. The nonfarm employment index, at 126.5, is over 6 points higher than the year ago level of 120.3; and the data shows that we have added 56,300 wage and salary jobs over the past 12 months. Particularly impressive is the fact that every nonmanufacturing sector for which we regularly track and report employment, except for three, saw employment gains over the past year. Nonmanufacturing employment, overall, increased by 53,400 jobs, accounting for almost all the increase in the last 12 months. The three sectors which did not grow at least remained stable. Even in manufacturing, which added only 2,900 jobs since last January, more industries saw gains than losses, and this growth was well-distributed over a variety of industries such as millwork, mobile homes, primary metals, machinery, apparel, and chemicals.

SEASONALLY ADJUSTED UNEMPLOYMENT RATES*

OREGON and THE UNITED STATES: 1980 to 1989



*Civilian Labor Force Only

Oregon's economy showed across-the-board strength in the past month as well as over the past year. While all major employment sectors showed job losses in January, these were generally less than seasonally expected. January saw lumber and wood products employment drop by 1,400; food processing also lost 1,400 jobs (due to normal January shutdowns for plant maintenance). Construction employment dropped by 3,300, and retail trade lost 11,000 jobs as stores reduced staffing levels from their Christmas season peaks. Government employment fell by 2,000, and the services sector saw a job loss of 4,400 with 2,400 of this coming from business services.

While these numbers don't look encouraging on the surface, when compared with expected seasonal employment losses we see a substantially different picture. On a seasonally adjusted basis, these raw numbers convert to: lumber and wood products employment of 400 more than projected (probably due to relatively mild weather in January), other durable goods manufacturing up by 800 jobs (strong demand for capital equipment), and food processing losing 200 fewer jobs than seasonal trends for the industry indicated. The only manufacturing sector to record greater than normal job losses was other nondurables, which dropped only 100 on a seasonally adjusted basis.

In nonmanufacturing, the employment picture was also very similar. Smaller than expected seasonal job losses between December and January occurred in virtually all the major industries. While mining and services performed about as expected, seasonally adjusted employment rose in all other sectors led by trade (+3,100) and transportation, communication & utilities (+2,000), due in large part to a strong showing in trucking and warehousing. January's favorable weather also had a positive influence on construction.

Labor disputes did not affect the December to January changes, as the number of workers on strike held steady at 1,200. No new strikes began, nor old ones ended, between the mid-month survey weeks. However, February's strike picture will be substantially different as 3,300 lumber and wood products workers in Southern Oregon struck too late in the month to be recorded in January's data. In addition, 900 timber workers who had been on strike settled their disputes and returned to work after the mid-January survey week.

Of particular interest is the trend in lumber and wood products employment over the past few months. Considerable media attention has been given to the recent flurry of mill closures and layoffs. Since July 1, 1988, 17 facilities have closed down or laid off workers, producing job losses of 1,150. Yet, total job losses in the timber industry from July to January were only 1,800, which is far below the expected seasonal decline for this period.

One reason for this unusually small job loss relates to the timber industry's labor dispute situation over this same period. In July, there were about 3,200 timber workers on strike, while in January the number of strikers was only 1,200. Since striking workers are included in the total employment count but are not included in the industry employment totals which are developed from payroll records, the picture is skewed somewhat. However, even when the data is adjusted for timber workers involved in labor disputes, the total job loss from July to January is still 600 less than normal seasonal factors would predict. While January was a good month due, in part, to favorable weather, December's seasonally adjusted timber industry employment level was also higher than expected (+200) when compared with last July. This shows that the large number of layoffs and closures announced over the past few months, while causing considerable distress to the workers who have lost or will lose their jobs, has not resulted in exceptional employment declines for the industry. Quite the opposite has occurred as timber employment has grown on a seasonally adjusted basis in spite of the closures and layoffs. This means that many mills must have maintained virtually all of the workers they had in July, experiencing little, if any, seasonal decline. Thus, the industry as a whole would seem to be quite healthy at present, despite problems afflicting individual producers over the last few months. This would indicate that demand for wood products has not dropped more than seasonally expected over this period, and that lack of product demand was not a significant factor in the mill closure picture. Demand for products which the closed mills used to supply has probably shifted to the remaining producers, allowing them to keep production and employment levels up.

A positive note is that Oregon's economy is projected to out-perform the nation over the next two years.

Why has demand for the products of our local mills held up so well given the long-term decline in U.S. housing starts? At least three factors can be cited. First, the remodeling industry has

consumed an increasing proportion of industry output over the last few years, taking up the slack from declining housing starts. Secondly, the new housing that is being built has tended to be larger, upscale, single-family homes, not multi-family units nor starter homes. Upscale single-family units consume more lumber than other types of housing construction. Thus, the drop in product demand would not be as great as the decline in the number of housing starts. Finally, the West Coast has continued to enjoy a new home construction boom even though other sections of the country have seen home building stagnate or decline. How long these factors can continue to hold up our regional timber industry is uncertain. Our data indicates that another 950 jobs will be lost to layoffs and closures through April, and the long-term decline in housing construction is apt to continue. Although January saw an 8% increase in new housing starts, good weather in the Northeast skewed the seasonal trend. As interest rates continue to climb over the next few months, and as log supplies and stumpage costs continue to be a problem, more mills may find themselves squeezed between higher prices for a limited supply of timber and declining sales (and prices) for their final products as home building activity drops further due to higher interest rates. A positive note is that Oregon's economy is projected to outperform the nation over the next two years. If so, rapid population growth and accompanying housing construction in the Northwest should also outpace the nation.

The superior performance of Oregon's economy in December and January, with our unemployment rate dropping below the nation's, is the continuation of a trend since mid-1986 of Oregon's economy growing faster than the rest of the nation. From 1980 to 1985, Oregon's economy lagged the rest of the nation, going into the last recession faster and deeper than the rest of the country. As the unemployment chart shows, however, this picture reversed in the middle of 1986, and Oregon's unemployment rate fell sharply, dropping below the U.S. rate for much of 1987. While Oregon's 1988 unemployment rate showed less improvement over 1987 than nationally (6.2% to 5.8% in Oregon versus 6.2% to 5.5% nationally), this does not give the complete picture. In 1988, Oregon added 52,200 new wage and salary jobs for a growth rate of 4.7%, which significantly outpaced the 3.6% national growth rate for wage and salary employment. Thus, the Oregon economy continued to out-perform the rest of the country in 1988 in terms of new job creation.

Since 1985, Oregon has added 122,300 new jobs; 15,000 in manufacturing and 107,300 in nonmanufacturing industries. Job growth has been across diverse industries and economic sectors, including many of the state's traditional manufacturing industries. While total manufacturing employment increased 15,000 over the past three years (reflecting declines in some sectors and gains in others), the state's largest basic industry, lumber & wood products, added 5,100 new jobs. Significant gains also occurred in many other manufacturing industries led by transportation equipment (+2,000) and printing & publishing (+2,000). Primary metals even added 1,400 new jobs as previously shut-down smelters reopened. Only two manufacturing sectors lost jobs: instruments & related products (-2,700) and paper & allied products (-400). Oregon's food products industry remained relatively stable at about 24,000 as it has throughout the 1980s. This indicates that recovery in some of the state's traditional basic industries rather than expansion in new industry sectors was an important factor in the state's economic resurgence. Other factors propelling our economy include an expanding level of trade with Pacific Rim nations, the recent recovery of our diverse agricultural industry, strong capital spending for business equipment, and growth of the Portland area as an urban services center with increased employment in the financial services and business services sectors.

Rising interest rates . . . could severely damage the homebuilding industry nationwide and reduce the demand for Oregon wood products.

The outlook for Oregon in 1989 would seem to be for much of the same, despite slower overall growth and some expected job losses in the lumber & wood products industry. This was discussed in the "1989 economic outlook" article by Jeff Hannum in the January issue of **Oregon Labor Trends**. State Economist Ann Hanus (Executive Department) has recently released the latest official state economic projections, which show that Oregon's economy should out-perform the rest of the country over the next two years. The leaner and meaner timber industry, growing Pacific Rim trade, expansion of the state's tourism and recreation industry, and continued rapid population growth along with a more stabilized agricultural sector should all contribute to the Executive Department's projections coming true. How well we actually do will depend on a number of factors. Rising interest rates leading into a national recession, as some economists are forecasting, could severely damage the homebuilding industry nationwide and reduce the demand for Oregon wood products. Tighter log supplies and high stumpage costs could combine to create real problems for the Northwest's timber companies.

The state could also see some problems in the important electronics industry. Some analysts think that the recent decline in the semiconductor industry's book-to-bill ratio is pointing the high tech industries toward a cyclical slowdown in the near future. The book-to-bill ratio is the ratio of new orders to current product shipments, and is frequently used as a leading indicator to predict the future performance of the high tech industries. While this ratio has fallen in recent months, it may not be as negative a situation as some analysts believe. This is because the health of the electronics industry and demand for most computer products is dependent upon the business investment cycle. Business investment to expand and modernize facilities is holding up surprisingly well at the present time despite the rise in interest rates over the past few months. Investment in plant and equipment may be continuing because the big increase in interest rates has been in short-term rather than long-term rates. It is the long-term rates which have the most impact on the investment cycle. So if Ms. Hanus' projections hold up, which seems very likely to this economist, Oregon should enjoy another two years of outpacing the national economy. □

'OREGON CAREERS' READY FOR 1989

Oregon Careers 1989 is now ready for distribution from the Employment Division. This tabloid is designed for career decision-makers of all ages from junior high students to senior citizens. Its purpose is to inform readers about the Oregon economy and to describe the state's major occupations--their employment levels, wages, outlook, training and licensure requirements--and some of the many state and local human resource programs available to help Oregonians prepare for the labor market.

Copies are available by contacting Susan Bell in Salem at 378-6400 or toll-free 1-800-237-3710 extension 8-6400.

RESIDENT OREGON LABOR FORCE

	JAN.[1] 1989	DEC.[2] 1988	CHANGE	%CHANGE	JAN.[5] 1988
CIVILIAN LABOR FORCE[3]	1,426,100	1,433,600	-7,500	-0.5	1,399,900
UNEMPLOYMENT	87,000	77,400	9,600	12.4	99,800
PERCENT OF LABOR FORCE	6.1	5.4	XXX	XXX	7.1
SEASONALLY ADJUSTED PERCENT	5.1	5.1	XXX	XXX	6.0
TOTAL EMPLOYMENT[4]	1,339,100	1,356,200	-17,100	-1.3	1,300,100

[1]Preliminary.
[2]Revised.
[3]Includes employed and unemployed individuals 16 years and older. Data are adjusted for multiple job-holding and commuting.
[4]Includes nonagricultural wage and salary, self-employed, unpaid family workers, domestics, farm workers, and labor disputants.
[5]Due to revised estimating procedures between December 1988 and January 1989, data for 1989 and that of previous years are not strictly comparable.

NONAGRICULTURAL WAGE AND SALARY EMPLOYMENT (BY PLACE OF WORK)

INDUSTRY	JAN.[1] 1989	DEC.[2] 1988	JAN. 1988	CHANGE FROM DEC. 1988	CHANGE FROM JAN. 1988
TOTAL[3]	1,157,800	1,183,300	1,101,500	-25,500	56,300
WAGE & SALARY EMPLOYMENT INDEX[4]	126.5	125.7	120.3	XXX	XXX
TOTAL MANUFACTURING	209,300	212,700	206,400	-3,400	2,900
DURABLE GOODS	154,700	156,400	151,900	-1,700	2,800
LUMBER & WOOD PRODUCTS	67,100	68,500	67,800	-1,400	-700
LOGGING & SAWMILLS	33,700	34,900	34,500	-1,200	-800
VENEER & PLYWOOD	16,700	16,800	17,700	-100	-1,000
MILLWORK & STRUCTURAL WOOD	10,500	10,600	9,900	-100	600
MOBILE HOMES	1,800	1,800	1,400	0	400
OTHER WOOD PRODUCTS	4,400	4,400	4,300	0	100
FURNITURE AND FIXTURES	2,600	2,600	2,600	0	0
STONE, CLAY, GLASS & CONCRETE	4,100	4,200	3,600	-100	500
PRIMARY METALS	10,600	10,600	9,800	0	800
BLAST FURNACES, IRON & STEEL	6,300	6,300	5,800	0	500
NONFERROUS METALS	4,300	4,300	4,000	0	300
FABRICATED METALS	11,600	11,800	10,100	-200	1,500
FABRICATED STRUCTURAL METALS	5,100	5,200	4,200	-100	900
OTHER FABRICATED METALS	6,500	6,600	5,900	-100	600
MACHINERY	17,700	17,500	16,700	200	1,000
ELECTRICAL EQUIPMENT & SUPPLIES	16,100	16,100	14,400	0	1,700
TRANSPORTATION EQUIPMENT	10,100	10,100	11,100	0	-1,000
INSTRUMENTS & RELATED PRODUCTS	11,400	11,500	12,300	-100	-900
MISCELLANEOUS MANUFACTURING	3,400	3,500	3,500	-100	-100
NONDURABLE GOODS	54,600	56,300	54,500	-1,700	100
FOOD & KINDRED PRODUCTS	20,500	21,900	20,800	-1,400	-300
CANNING & PRESERVING	9,000	10,300	10,100	-1,300	-1,100
OTHER FOOD PRODUCTS	11,500	11,600	10,700	-100	800
TEXTILE MILL PRODUCTS	1,700	1,700	1,800	0	-100
APPAREL	2,700	2,700	2,500	0	200
PAPER & ALLIED PRODUCTS	8,400	8,400	9,000	0	-600
PRINTING & PUBLISHING	13,600	13,800	13,200	-200	400
CHEMICALS & ALLIED PRODUCTS	2,300	2,200	2,100	100	200
PETROLEUM REFINING	500	500	500	0	0
RUBBER & PLASTIC PRODUCTS	4,500	4,600	4,200	-100	300
LEATHER PRODUCTS	400	500	400	-100	0
TOTAL NONMANUFACTURING	948,500	970,600	895,100	-22,100	53,400
MINING & QUARRYING	1,200	1,400	1,200	-200	0
CONSTRUCTION	36,800	40,100	32,700	-3,300	4,100
TRANSPORTATION, COMMUNICATIONS, & UTILITIES	62,300	62,300	58,300	0	4,000
TRANSPORTATION	40,900	40,900	37,100	0	3,800
RAILROAD	3,800	3,800	3,800	0	0
TRUCKING & WAREHOUSING	22,900	22,800	21,200	100	1,700
OTHER TRANSPORTATION	14,200	14,300	12,100	-100	2,100
COMMUNICATIONS	12,700	12,600	12,500	100	200
UTILITIES	8,700	8,800	8,700	-100	0
TRADE	295,800	307,200	275,900	-11,400	19,900
WHOLESALE TRADE	74,800	75,200	68,100	-400	6,700
DURABLE GOODS	43,800	44,000	39,900	-200	3,900
NONDURABLE GOODS	31,000	31,200	28,200	-200	2,800
RETAIL TRADE	221,000	232,000	207,800	-11,000	13,200
GENERAL MERCHANDISE	28,900	32,700	28,600	-3,800	300
FOOD STORES	38,400	38,900	33,800	-500	4,600
AUTO DEALERS & SERVICE STATIONS	27,000	27,600	26,400	-600	600
OTHER RETAIL TRADE	126,700	132,800	119,000	-6,100	7,700
FINANCE, INSURANCE, & REAL ESTATE	73,500	74,300	71,500	-800	2,000
BANKING & CREDIT AGENCIES	23,800	23,700	23,500	100	300
OTHER FINANCE, INSURANCE, & REAL ESTATE	49,700	50,600	48,000	-900	1,700
SERVICES	263,900	268,300	246,500	-4,400	17,400
HOTELS & PERSONAL SERVICES	26,500	26,900	26,000	-400	500
HEALTH SERVICES	80,300	79,800	75,000	500	5,300
OTHER SERVICES	157,100	161,600	145,500	-4,500	11,600
GOVERNMENT	215,000	217,000	209,000	-2,000	6,000
FEDERAL GOVERNMENT	31,400	32,500	30,000	-1,100	1,400
STATE GOVERNMENT	59,300	59,600	57,700	-300	1,600
EDUCATION	24,500	25,200	24,400	-700	100
OTHER STATE	34,800	34,400	33,300	400	1,500
LOCAL GOVERNMENT	124,300	124,900	121,300	-600	3,000
EDUCATION	79,600	79,900	77,900	-300	1,700
OTHER LOCAL	44,700	45,000	43,400	-300	1,300
LABOR - MANAGEMENT DISPUTES	1,200	1,200	100	1,200	1,100

[1]Preliminary.
[2]Revised.
[3]Includes full and part-time nonfarm wage and salary workers in pay periods including the 12th of the month. Proprietors, self-employed, private household workers and armed forces excluded. Note: Estimated in cooperation with the U.S. Bureau of Labor Statistics and Employment and Training Administration. All data are based on the 1972 Standard Industrial Classification (SIC) codes as amended by the 1977 supplement.
[4]Total nonagricultural wage and salary employment, seasonally adjusted, and indexed to 1977. Data on the earlier index (1972 = 100) can be converted to the 1977 base period by multiplying by a factor of .8264, the ratio between 1972's Annual Average Employment (774,300) and that of 1977 (936,900).

State of Oregon
EMPLOYMENT DIVISION
Department of Human Resources

Research and Statistics
March 1988 Benchmark
February 1989

OREGON RESIDENT LABOR FORCE, UNEMPLOYMENT & EMPLOYMENT 1988 1/

	Annual Average 2/	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
CIVILIAN LABOR FORCE	1,408.0	1,376.1	1,383.5	1,391.7	1,392.2	1,398.7	1,428.9	1,437.0	1,432.9	1,411.4	1,411.3	1,418.1	1,414.3
UNEMPLOYMENT	82.0	96.8	96.1	91.7	87.1	84.6	84.1	84.9	78.9	73.9	67.5	69.2	69.3
Percent of Labor Force	5.8	7.0	6.9	6.6	6.3	6.0	5.9	5.9	5.5	5.2	4.8	4.9	4.9
Seasonally Adjusted Percent	5.8	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
TOTAL EMPLOYMENT	1,326.0	1,279.3	1,287.4	1,300.0	1,305.1	1,314.1	1,344.8	1,352.1	1,354.0	1,337.5	1,343.8	1,348.9	1,345.0

OREGON NONAGRICULTURAL WAGE & SALARY EMPLOYMENT 1988 3/ **

TOTAL WAGE & SALARY	1152.3	1101.5	1113.2	1123.6	1133.2	1146.6	1163.6	1149.1	1162.6	1174.2	1187.2	1189.1	1183.3
Wage & Salary Emp. Index (1977=100) 4/	123.0	120.3	121.4	121.8	121.8	122.0	122.4	122.9	123.5	123.7	124.6	125.4	125.7
MANUFACTURING, TOTAL	214.3	206.4	208.0	207.6	208.3	211.4	215.5	218.4	225.0	222.4	220.6	215.5	212.7
Durable Goods	155.9	151.9	153.1	153.1	153.6	156.0	156.3	157.8	159.2	158.0	158.5	157.2	156.4
Lumber & Wood Products	68.7	67.8	68.1	67.6	67.8	69.0	68.5	68.9	69.7	68.6	69.9	69.6	68.5
Logging & Sawmills	35.1	34.5	34.8	34.3	34.3	35.1	35.3	35.5	35.6	34.0	36.3	36.0	34.9
Veneer & Plywood	17.2	17.7	17.7	17.6	17.7	17.6	16.5	16.6	17.0	17.5	16.9	16.9	16.8
Millwork & Structural Wood	10.4	9.9	9.9	9.9	10.0	10.3	10.8	10.8	10.9	10.7	10.4	10.4	10.6
Mobile Homes	1.6	1.4	1.4	1.4	1.4	1.5	1.6	1.7	1.8	1.8	1.8	1.8	1.8
Other Wood Products	4.4	4.3	4.3	4.4	4.4	4.5	4.3	4.3	4.4	4.6	4.5	4.5	4.4
Furniture & Fixtures	2.7	2.6	2.6	2.7	2.7	2.8	2.8	2.8	2.7	2.7	2.7	2.7	2.6
Stone, Clay, Glass & Concrete Prod.	4.1	3.6	3.6	3.7	4.0	4.1	4.2	4.3	4.5	4.5	4.5	4.3	4.2
Primary Metals	10.2	9.8	9.9	9.9	10.0	10.1	10.3	10.4	10.5	10.3	10.4	10.3	10.6
Blast Furnaces, Iron & Steel Found.	6.0	5.8	5.8	5.8	5.9	5.9	6.0	6.0	6.0	6.0	6.1	6.0	6.3
Nonferrous Metals	4.2	4.0	4.1	4.1	4.1	4.2	4.3	4.4	4.5	4.3	4.3	4.3	4.3
Fabricated Metals	11.0	10.1	10.2	10.4	10.5	10.6	10.9	11.2	11.3	11.4	11.5	11.5	11.8
Fabricated Structural Metals	4.6	4.2	4.2	4.3	4.4	4.4	4.5	4.7	4.7	4.8	4.8	4.9	5.2
Other Fabricated Metals	6.4	5.9	6.0	6.1	6.1	6.2	6.4	6.5	6.6	6.6	6.7	6.6	6.6
Machinery	17.1	16.7	16.9	17.0	16.8	17.0	16.9	17.1	17.3	17.4	17.5	17.5	17.5
Electrical Equipment & Supplies	15.3	14.4	14.5	14.7	14.9	15.1	15.2	15.5	15.7	15.8	15.7	15.9	16.1
Transportation Equipment	11.2	11.1	11.4	11.1	11.0	11.5	11.5	11.7	11.7	11.7	10.8	10.2	10.1
Instruments & Related Products	11.9	12.3	12.3	12.3	12.2	12.0	12.0	11.9	11.9	11.8	11.7	11.4	11.5
Miscellaneous Manufacturing	3.8	3.5	3.6	3.7	3.7	3.8	4.0	4.0	3.9	3.8	3.8	3.8	3.5
Nondurable Goods	58.4	54.5	54.9	54.5	54.7	55.4	59.2	60.6	65.8	64.4	62.1	58.3	56.3
Food & Kindred Products	24.1	20.8	21.0	20.4	20.4	21.4	24.4	26.0	31.3	29.8	28.0	24.3	21.9
Canning & Preserving	13.0	10.1	10.4	9.8	9.6	10.3	13.1	14.6	19.9	18.5	16.3	12.5	10.3
Other Food Products	11.2	10.7	10.6	10.6	10.8	11.1	11.3	11.4	11.4	11.3	11.7	11.8	11.6
Textile Mill Products	1.8	1.8	1.8	1.8	1.8	1.7	1.8	1.8	1.8	1.8	1.7	1.7	1.7
Apparel	2.7	2.5	2.6	2.5	2.6	2.7	2.7	2.7	2.7	2.8	2.7	2.7	2.7
Paper & Allied Products	8.7	9.0	9.0	9.0	8.9	8.4	9.0	8.8	8.6	8.5	8.4	8.3	8.4
Printing & Publishing	13.5	13.2	13.3	13.4	13.4	13.4	13.5	13.3	13.5	13.5	13.5	13.6	13.8
Chemicals & Allied Products	2.2	2.1	2.1	2.1	2.2	2.2	2.2	2.3	2.3	2.3	2.2	2.2	2.2
Petroleum Refining	0.6	0.5	0.5	0.5	0.5	0.6	0.6	0.6	0.6	0.6	0.6	0.5	0.5
Rubber & Plastic Products	4.5	4.2	4.2	4.3	4.4	4.5	4.5	4.6	4.6	4.6	4.5	4.6	4.6
Leather Products	0.5	0.4	0.4	0.5	0.5	0.5	0.5	0.5	0.4	0.5	0.5	0.4	0.5

1988 Continued

	Annual Average	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
NONMANUFACTURING, TOTAL	938.0	895.1	905.2	916.0	924.9	935.2	948.1	930.7	937.6	951.8	966.6	973.6	970.6
Mining & Quarrying	1.4	1.2	1.3	1.3	1.3	1.3	1.4	1.4	1.4	1.4	1.5	1.5	1.4
Construction	39.0	32.7	33.4	34.8	37.5	39.2	40.2	41.6	43.1	42.9	42.7	39.8	40.1
Transp., Comm. & Utilities	60.5	58.3	58.7	59.1	59.2	59.8	60.7	60.6	61.6	61.5	61.9	62.2	62.3
Transportation	39.1	37.1	37.5	37.8	37.8	38.3	39.1	39.0	39.9	40.0	40.5	40.7	40.9
Railroad	3.9	3.8	3.8	3.9	3.9	3.9	3.9	3.9	3.9	3.9	4.0	3.9	3.8
Trucking & Warehousing	22.0	21.2	21.4	21.4	21.3	21.5	22.1	22.3	22.5	22.0	22.4	22.6	22.8
Other Transportation	13.2	12.1	12.3	12.5	12.6	12.9	13.1	12.8	13.5	14.1	14.1	14.2	14.3
Communications	12.6	12.5	12.5	12.5	12.5	12.6	12.7	12.7	12.8	12.7	12.7	12.8	12.6
Utilities	8.8	8.7	8.7	8.8	8.9	8.9	8.9	8.9	8.9	8.8	8.7	8.7	8.8
Trade	291.3	275.9	275.7	279.0	282.4	285.7	292.0	295.1	297.9	299.3	301.2	304.7	307.2
Wholesale Trade	72.0	68.1	68.8	69.5	70.2	70.4	72.1	73.0	74.0	74.1	74.4	74.6	75.2
Durable Goods	42.1	39.9	40.2	40.5	41.0	41.5	42.3	42.8	43.3	43.0	43.1	43.5	44.0
Nondurable Goods	29.9	28.2	28.6	29.0	29.2	28.9	29.8	30.2	30.7	31.1	31.3	31.1	31.2
Retail Trade	219.3	207.8	206.9	209.5	212.2	215.3	219.9	222.1	223.9	225.2	226.8	230.1	232.0
General Merchandise	28.5	28.6	27.1	27.1	26.8	26.9	27.2	27.6	28.1	28.5	29.7	31.3	32.7
Food Stores	36.5	33.8	34.1	34.4	34.4	35.2	36.3	37.1	37.9	38.0	39.0	39.1	38.9
Auto Dealers & Service Stations	27.9	26.4	26.4	26.9	27.7	27.9	28.5	28.8	28.7	28.8	28.5	28.2	27.6
Other Retail Trade	126.5	119.0	119.3	121.1	123.3	125.3	127.9	128.6	129.2	129.9	129.6	131.5	132.8
Finance, Ins. & Real Estate	73.6	71.5	71.9	72.7	72.9	73.3	74.4	74.5	74.8	74.8	74.2	73.9	74.3
Banking & Credit Agencies	23.7	23.5	23.5	23.6	23.8	23.8	23.9	24.0	23.9	23.7	23.5	23.5	23.7
Other Finance, Ins. & Real Estate	49.9	48.0	48.4	49.1	49.1	49.5	50.5	50.5	50.9	51.1	50.7	50.4	50.6
Services	260.6	246.5	251.8	254.9	257.0	257.7	260.4	262.2	263.9	267.1	267.6	269.9	268.3
Hotels & Personal Services	27.8	26.0	26.4	27.1	27.7	27.9	29.1	29.5	29.5	28.7	27.8	27.3	26.9
Health Services	77.4	75.0	75.4	76.1	76.6	76.7	77.5	77.2	77.8	78.5	79.0	79.3	79.8
Other Services	155.4	145.5	150.0	151.7	152.7	153.1	153.8	155.5	156.6	159.9	160.8	163.3	161.6
Government	211.5	209.0	212.4	214.2	214.6	218.2	219.0	195.3	194.9	204.8	217.5	221.6	217.0
Federal	31.7	30.0	29.5	29.6	30.4	31.3	32.8	33.1	33.0	32.9	32.7	32.3	32.5
State Government	58.6	57.7	58.9	59.3	59.3	59.7	60.5	55.8	56.4	55.8	60.2	60.4	59.6
Education	23.9	24.4	25.5	25.7	25.3	25.5	25.6	19.9	19.5	19.8	25.2	25.7	25.2
Other State	34.7	33.3	33.4	33.6	34.0	34.2	34.9	35.9	36.9	36.0	35.0	34.7	34.4
Local Government	121.2	121.3	124.0	125.3	124.9	127.2	125.7	106.4	105.5	116.1	124.6	128.9	124.9
Education	75.4	77.9	80.3	81.0	80.1	81.0	78.6	58.0	57.1	69.5	78.9	81.9	79.9
Other Local	45.9	43.4	43.7	44.3	44.8	46.2	47.1	48.4	48.4	46.6	45.7	47.0	45.0
LABOR-MANAGEMENT DISPUTES	1.4	0.1	0.1	0.2	0.1	0.7	2.4	4.9	3.8	1.1	0.8	1.2	1.2

** Data are in thousands

1/ Includes employed and unemployed individuals 16 years and older by place of residence. Data are adjusted for multiple job-holding and commuting. Includes nonagricultural wage and salary, self-employed, unpaid family workers, domestics, agriculture and labor disputants.

2/ Sum of monthly estimates divided by 12. Unemployment rate derived by dividing unemployment by civilian labor force.

3/ This nonagricultural wage and salary employment series is based on the 1972 Standard Industrial Classification (SIC) manual as amended by the 1977 supplement. The data are by place of work and persons working multiple jobs are counted more than once. Workers involved in labor-management disputes are excluded from the wage and salary employment totals.

4/ Total nonagricultural wage and salary employment, seasonally adjusted and indexed to 1977. Data on the earlier index (1972 = 100) can be converted to the 1977 base period by multiplying by a factor of .8264, the ratio between 1972's annual average employment (774.3) and that of 1977 (936.9).

State of Oregon
EMPLOYMENT DIVISION
Department of Human Resources

Research and Statistics
March 1988 Benchmark
February 1989

OREGON RESIDENT LABOR FORCE, UNEMPLOYMENT & EMPLOYMENT 1987 1/

	Annual Average 2/	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
CIVILIAN LABOR FORCE	1,387.0	1,356.4	1,359.7	1,360.5	1,362.1	1,374.6	1,402.7	1,411.1	1,420.5	1,397.7	1,401.7	1,405.3	1,391.6
UNEMPLOYMENT	86.0	108.7	102.9	98.4	88.0	83.6	83.0	81.3	78.7	75.7	74.8	76.4	80.5
Percent of Labor Force	6.2	8.0	7.6	7.2	6.5	6.1	5.9	5.8	5.5	5.4	5.3	5.4	5.8
Seasonally Adjusted Percent	6.2	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
TOTAL EMPLOYMENT	1,301.0	1,247.7	1,256.8	1,262.1	1,274.1	1,291.0	1,319.7	1,329.8	1,341.8	1,322.0	1,326.9	1,328.9	1,311.1

OREGON NONAGRICULTURAL WAGE & SALARY EMPLOYMENT 1987 3/ **

TOTAL WAGE & SALARY	1100.1	1050.2	1058.1	1067.2	1079.1	1095.1	1110.9	1103.2	1110.8	1126.2	1134.3	1135.0	1131.5
Wage & Salary Emp. Index (1977=100) 4/	117.4	114.7	115.3	115.7	116.0	116.5	116.8	118.0	118.0	118.6	119.1	119.7	120.3
MANUFACTURING, TOTAL	206.2	191.9	194.6	195.4	196.6	201.2	208.8	216.1	217.8	217.9	213.0	212.0	209.4
Durable Goods	149.2	140.5	141.3	142.1	143.4	147.6	150.6	153.6	154.4	155.0	152.6	154.3	154.4
Lumber & Wood Products	68.0	64.6	64.0	64.2	65.3	67.4	69.7	71.3	71.5	71.3	68.8	69.2	69.2
Logging & Sawmills	34.9	33.1	32.4	32.3	32.7	34.1	35.7	37.0	37.3	37.0	35.3	35.8	35.7
Veneer & Plywood	17.7	17.3	17.3	17.5	17.5	17.7	17.9	18.0	17.9	17.9	17.6	17.6	17.6
Millwork & Structural Wood	10.2	9.5	9.5	9.6	10.0	10.4	10.7	10.7	10.7	10.7	10.3	10.1	10.2
Mobile Homes	1.4	1.2	1.2	1.2	1.3	1.3	1.4	1.5	1.5	1.5	1.5	1.5	1.5
Other Wood Products	3.9	3.5	3.6	3.6	3.8	3.9	4.0	4.1	4.1	4.2	4.1	4.2	4.2
Furniture & Fixtures	2.5	2.4	2.4	2.4	2.4	2.5	2.5	2.6	2.5	2.6	2.7	2.7	2.7
Stone, Clay, Glass & Concrete Prod.	3.6	3.1	3.2	3.2	3.3	3.6	3.7	3.8	3.9	4.0	4.1	3.9	3.8
Primary Metals	9.3	8.5	8.7	8.9	9.0	9.1	9.4	9.6	9.5	9.7	9.7	9.7	9.8
Blast Furnaces, Iron & Steel Found.	5.5	5.2	5.3	5.4	5.4	5.4	5.6	5.6	5.6	5.7	5.7	5.7	5.8
Nonferrous Metals	3.8	3.3	3.4	3.5	3.6	3.7	3.8	4.0	3.9	4.0	4.0	4.0	4.0
Fabricated Metals	10.2	9.7	9.7	9.9	9.8	10.0	10.2	10.3	10.5	10.7	10.6	10.5	10.4
Fabricated Structural Metals	4.4	4.2	4.3	4.4	4.3	4.4	4.5	4.5	4.6	4.7	4.5	4.5	4.4
Other Fabricated Metals	5.8	5.5	5.4	5.5	5.5	5.6	5.7	5.8	5.9	6.0	6.1	6.0	6.0
Machinery	15.8	15.0	15.2	15.2	15.4	15.6	15.8	15.8	15.9	16.1	16.1	16.5	16.6
Electrical Equipment & Supplies	13.6	12.8	12.9	13.0	13.2	13.3	13.5	13.8	13.9	13.9	14.1	14.2	14.3
Transportation Equipment	10.8	9.7	10.4	10.4	10.1	11.0	10.6	11.0	11.2	11.2	10.8	11.4	11.7
Instruments & Related Products	12.1	12.1	12.1	12.1	12.1	12.1	12.1	12.2	12.2	12.1	12.1	12.2	12.3
Miscellaneous Manufacturing	3.2	2.6	2.7	2.8	2.8	3.0	3.1	3.2	3.3	3.4	3.6	4.0	3.6
Nondurable Goods	57.1	51.4	53.3	53.3	53.2	53.6	58.2	62.5	63.4	62.9	60.4	57.7	55.0
Food & Kindred Products	24.0	19.3	21.0	20.7	20.7	20.9	25.3	29.3	29.9	29.3	26.6	23.6	21.1
Canning & Preserving	13.2	8.7	10.4	10.2	10.2	10.3	14.4	18.3	18.9	18.4	15.5	12.5	10.1
Other Food Products	10.8	10.6	10.6	10.5	10.5	10.6	10.9	11.0	11.0	10.9	11.1	11.1	11.0
Textile Mill Products	1.8	1.7	1.7	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8
Apparel	2.5	2.4	2.5	2.5	2.5	2.5	2.5	2.4	2.5	2.5	2.6	2.6	2.6
Paper & Allied Products	9.2	9.2	9.2	9.2	9.2	9.1	9.2	9.3	9.3	9.2	9.0	9.0	9.0
Printing & Publishing	12.8	12.4	12.4	12.5	12.4	12.5	12.5	12.7	12.8	12.9	13.1	13.4	13.4
Chemicals & Allied Products	2.1	2.0	2.0	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1
Petroleum Refining	0.5	0.4	0.4	0.4	0.4	0.5	0.5	0.6	0.6	0.6	0.6	0.6	0.5
Rubber & Plastic Products	3.8	3.5	3.6	3.6	3.7	3.7	3.8	3.9	3.9	4.0	4.1	4.1	4.1
Leather Products	0.5	0.5	0.5	0.5	0.4	0.5	0.5	0.4	0.5	0.5	0.5	0.5	0.4

1987 Continued

	Annual Average	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
NONMANUFACTURING, TOTAL	893.9	858.3	863.5	871.8	882.5	893.9	902.1	887.1	893.0	908.3	921.3	923.0	922.1
Mining & Quarrying	1.4	1.3	1.3	1.3	1.4	1.4	1.5	1.5	1.5	1.5	1.5	1.5	1.4
Construction	35.3	29.6	29.4	29.9	32.2	34.4	36.0	38.5	39.1	39.8	39.6	38.6	36.2
Transp., Comm. & Utilities	58.5	56.8	57.0	57.2	57.6	57.9	58.6	58.6	58.8	59.8	59.8	59.4	60.2
Transportation	37.2	35.7	35.9	36.0	36.4	36.8	37.3	37.2	37.4	38.4	38.6	38.2	38.9
Railroad	4.0	4.0	3.9	3.9	4.0	4.0	4.0	4.0	4.0	4.0	4.0	3.9	3.8
Trucking & Warehousing	21.4	20.4	20.5	20.4	20.5	20.9	21.4	22.0	22.1	22.3	22.0	22.0	22.7
Other Transportation	11.8	11.3	11.5	11.7	11.9	11.9	11.9	11.2	11.3	12.1	12.6	12.3	12.4
Communications	12.5	12.5	12.5	12.5	12.4	12.3	12.4	12.5	12.5	12.5	12.5	12.5	12.5
Utilities	8.8	8.6	8.6	8.7	8.8	8.8	8.9	8.9	8.9	8.9	8.7	8.7	8.8
Trade	276.7	264.2	262.5	265.2	269.1	273.4	277.5	279.2	282.9	284.3	284.0	287.9	290.1
Wholesale Trade	68.2	65.9	65.8	66.5	67.2	67.5	68.5	69.0	69.9	70.1	69.7	69.3	69.1
Durable Goods	39.9	39.0	38.9	39.2	39.5	39.6	40.2	40.4	40.2	40.4	40.3	40.4	40.4
Nondurable Goods	28.3	26.9	26.9	27.3	27.7	27.9	28.3	28.6	29.7	29.7	29.4	28.9	28.7
Retail Trade	208.5	198.3	196.7	198.7	201.9	205.9	209.0	210.2	213.0	214.2	214.3	218.6	221.0
General Merchandise	27.1	26.5	25.3	25.2	25.6	25.8	26.3	26.7	27.2	27.2	27.8	30.2	31.4
Food Stores	33.8	32.2	32.1	32.2	32.6	33.2	33.8	34.2	34.6	34.8	35.0	35.3	35.3
Auto Dealers & Service Stations	26.5	24.7	24.9	25.2	26.1	26.7	27.0	27.1	27.3	27.3	27.2	27.0	27.0
Other Retail Trade	121.2	114.9	114.4	116.1	117.6	120.2	121.9	122.2	123.9	124.9	124.3	126.1	127.3
Finance, Ins. & Real Estate	72.1	70.1	70.2	70.7	71.5	72.0	72.8	73.6	73.6	73.4	72.4	72.2	72.5
Banking & Credit Agencies	23.8	23.8	23.8	23.8	23.8	23.8	23.8	23.9	23.9	23.9	23.7	23.8	23.9
Other Finance, Ins. & Real Estate	48.3	46.3	46.4	46.9	47.7	48.2	49.0	49.7	49.7	49.5	48.7	48.4	48.6
Services	244.4	233.0	236.7	239.0	242.4	243.7	243.2	246.2	248.9	249.3	250.1	249.6	250.1
Hotels & Personal Services	26.4	24.3	24.5	25.2	25.9	26.5	27.2	27.8	27.9	27.8	27.3	26.5	26.4
Health Services	74.4	73.3	73.4	73.9	73.8	73.7	74.4	74.8	75.3	75.4	75.0	74.9	75.4
Other Services	143.5	135.4	138.8	139.9	142.7	143.5	141.6	143.6	145.7	146.1	147.8	148.2	148.3
Government	205.6	203.3	206.4	208.5	208.3	211.1	212.5	189.5	188.2	200.2	213.9	213.8	211.6
Federal	30.6	28.6	28.0	28.6	29.7	30.2	30.8	32.2	32.4	32.6	31.9	30.9	30.8
State Government	56.9	55.2	56.6	57.8	57.7	57.5	58.8	54.3	53.8	54.0	59.6	59.1	58.5
Education	23.6	24.1	25.2	25.4	25.0	24.9	24.9	19.8	19.2	19.1	24.9	25.6	25.2
Other State	33.3	31.1	31.4	32.4	32.7	32.6	33.9	34.5	34.6	34.9	34.7	33.5	33.3
Local Government	118.1	119.5	121.8	122.1	120.9	123.4	122.9	103.0	102.0	113.6	122.4	123.8	122.3
Education	73.8	77.1	79.2	79.2	77.7	79.2	77.4	56.6	55.5	67.9	77.8	79.6	78.3
Other Local	44.4	42.4	42.6	42.9	43.2	44.2	45.5	46.4	46.5	45.7	44.6	44.2	44.0
LABOR MANAGEMENT DISPUTES	0.2	0.0	0.0	0.0	1.4	0.1	0.1	0.1	0.1	0.1	0.0	0.1	0.1

** Data are in thousands

1/ Includes employed and unemployed individuals 16 years and older by place of residence. Data are adjusted for multiple job-holding and commuting. Includes nonagricultural wage and salary, self-employed, unpaid family workers, domestics, agriculture and labor disputants.

2/ Sum of monthly estimates divided by 12. Unemployment rate derived by dividing unemployment by civilian labor force.

3/ This nonagricultural wage and salary employment series is based on the 1972 Standard Industrial Classification (SIC) manual as amended by the 1977 supplement. The data are by place of work and persons working multiple jobs are counted more than once. Workers involved in labor-management disputes are excluded from the wage and salary employment totals.

4/ Total nonagricultural wage and salary employment, seasonally adjusted and indexed to 1977. Data on the earlier index (1972 = 100) can be converted to the 1977 base period by multiplying by a factor of .8264, the ratio between 1972's annual average employment (774.3) and that of 1977 (936.9).

NATIONAL PAY SURVEY REPORT PUBLISHED

Pete Dissmore

Do you need information on the average wage of engineers in private industry in the United States ...or in metropolitan areas?

An important salary survey report was recently issued by the Bureau of Labor Statistics (publication date - November 1988). It is PATC - a national survey of professional, administrative, technical, and clerical pay (nicknamed Patsy), and has been conducted in a somewhat different manner in the last two years than previously. The 1987 survey was of service industries only (private) and the 1988 survey is of private nonservice industries. Prior reports covered a broader spectrum of industries so are not directly comparable.

The purpose of this survey series is to carry out the responsibilities of the Bureau of Labor Statistics (BLS) under the Federal Pay Comparability Act of 1970. However, it is very useful as an additional source of wage information on a national basis. Accountants, computer programmers, computer system analysts, drafters, engineers and numerous clerical jobs are typical of occupational categories included in the survey.

This source can be used in determining Oregon wage levels for certain occupations by adusting the data for differences between national and Oregon wage levels in the particular industry involved. Annual wages per employee by state and for the nation as a whole by private industry classification are obtained from another BLS publication **Employment and Wages**.

The PATC salary survey report is for sale by the Superintendent of Documents, U.S. Government Printing Office, Washington, D.C..20402. When ordering refer to Bulletin 2317.

Do you need information on the wage levels of accounting clerks in Oregon? Information regarding Oregon wage levels for 340 common occupations can be obtained without charge by requesting a copy of **Oregon Wage Information - 1988**. Over 70% of all Oregonians working for wages and salaries in the private and public sectors work in these occupations. This is not a survey report but rather a compilation of wage data from a variety of sources which was published last spring by the Oregon Employment Division. To receive this publication call Susan Bell at (503) 378-8657 or toll free 1-800-237-3710 ext. 8-8657. □

AVERAGE HOURS AND EARNINGS OF OREGON INDUSTRIAL PRODUCTION WORKERS[1]

	Average Weekly Earnings			Average Weekly Hours			Average Hourly Earnings		
	Dec.[2] 1988	Nov.[3] 1988	Dec. 1987	Dec.[2] 1988	Nov.[3] 1988	Dec. 1987	Dec.[2] 1988	Nov.[3] 1988	Dec. 1987
TOTAL MANUFACTURING[4]	$432.95	$420.22	$420.90	40.2	39.2	39.3	$10.77	$10.72	$10.71
Durable Goods	436.85	426.31	425.86	40.3	39.4	39.8	10.84	10.82	10.70
Lumber & Wood Products	437.30	420.98	418.86	39.9	38.8	39.0	10.96	10.85	10.74
Logging & Sawmills	469.62	448.90	437.37	39.2	38.4	37.9	11.98	11.69	11.54
Veneer & Plywood	436.40	417.59	409.51	40.9	39.1	39.3	10.67	10.68	10.42
Millwork & Structural	356.98	350.16	385.14	40.2	39.3	42.0	8.88	8.91	9.17
Mobile Homes	344.67	340.10	318.45	39.8	38.3	36.9	8.66	8.88	8.63
Other Wood Products	428.16	416.30	413.43	40.7	40.3	40.1	10.52	10.33	10.31
Furniture & Fixtures	293.75	329.73	316.09	36.4	37.3	37.9	8.07	8.84	8.34
Primary Metals	515.00	524.99	525.64	41.7	42.1	42.7	12.35	12.47	12.31
Fabricated Metals	381.22	388.85	381.64	38.9	39.8	40.6	9.80	9.77	9.40
Machinery (Ex Electrical)	456.04	443.19	459.91	40.9	39.5	41.1	11.15	11.22	11.19
Nondurable Goods	419.23	404.03	407.43	39.7	38.7	37.9	10.56	10.44	10.75
Food & Kindred Products	342.53	320.16	322.49	38.4	36.8	35.4	8.92	8.70	9.11
Canning & Preserving	295.66	264.44	266.40	38.1	35.4	33.3	7.76	7.47	8.00
Other Food Products	396.68	401.84	381.26	38.7	38.9	37.6	10.25	10.33	10.14
Textile Mill Products	267.84	253.74	263.20	37.2	36.3	37.6	7.20	6.99	7.00
Apparel	247.43	252.21	218.89	38.6	37.7	36.3	6.41	6.69	6.03
Paper & Allied Products	681.39	672.60	660.91	45.7	44.9	43.0	14.91	14.98	15.37
Printing & Publishing	445.88	444.17	425.35	37.5	37.2	36.7	11.89	11.94	11.59
Construction[4]	520.20	486.61	466.66	36.1	34.1	33.5	14.41	14.27	13.93
Communications & Utilities[5]	530.64	550.74	553.38	40.2	41.1	40.6	13.20	13.40	13.63
Trade[5]	306.64	299.04	282.38	34.3	33.6	33.3	8.94	8.90	8.48
Wholesale Trade	408.83	396.55	378.97	37.2	37.2	36.3	10.99	10.66	10.44
Retail Trade	256.62	251.05	235.32	32.9	31.9	31.8	7.80	7.87	7.40
Banking & Insurance[5]	340.71	336.70	309.46	37.4	37.0	35.9	9.11	9.10	8.62
State & Local Government	379.63	373.66	365.43						

[1]Figures are average gross hours and earnings of full and part-time worked or paid for, including overtime and shift premium pay. Prepared in cooperation with the U.S. Department of Labor. All data are based on the 1972 Standard Industrial Classification (SIC) codes.
[2]Preliminary
[3]Revised
[4]Data for production workers only and exclude administrative, supervisory (above working foremen), technical, sales and office personnel.
[5]Data for nonsupervisory employees only, excluding proprietors and executive personnel. Data for retail trade excludes eating and drinking places.

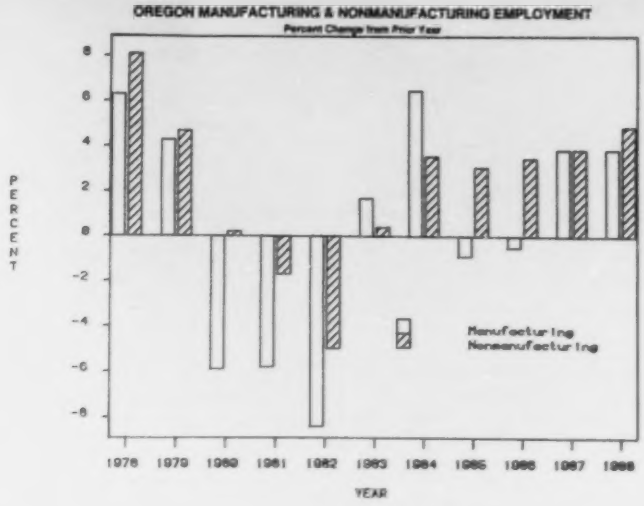
1988 JOB GROWTH REVISED UPWARD

Graham Slater

Employment and hours & earnings data for 1987 and 1988 have now been revised to the 1988 benchmark. ("Benchmarking" is an annual process of replacing monthly sample-based employment estimates with more complete counts from unemployment insurance tax records and other sources.) A summary of the new employment data is shown in the accompanying table, while full employment tables have been inserted into this edition of **Oregon Labor Trends**.

The benchmark resulted in a substantial upward revision in wage & salary employment for both years. The 1987 annual average (AA) grew by 6,100 (+0.6%) while the 1988 AA increased by 11,700 (+1.0%). As a result, our initial estimate of 4.3% nonag wage & salary employment growth in 1988 was elevated to 4.7%. This reflects the strongest year-to-year growth in ten years. Preliminary figures for the U.S. indicate a national growth rate in the 3.6% range, well below the Oregon performance.

Both the manufacturing and nonmanufacturing sectors participated in the State's strong performance in 1988 with growth rates of 3.9% and 4.9% respectively. These sectors' performance over several years is shown on one of the accompanying graphs.



The size of the revision (+11,700) was largely caused by underestimating just three industries out of the more than 100 for which employment estimates are computed. These industries were "other services" (a residual category of the services industry which includes social services, membership organizations, churches), business services (consisting of employment agencies, consultants, janitorial services, and more), and "miscellaneous special trade contractors" (dominated by painting & decorating, roofing & sheet metal work, and concrete contractors). In both the service categories, strong growth had been estimated throughout the year, but actual performance turned out even stronger.

Annual average wage & salary employment for 1988 was 1,152,300, an

COMPARISON OF 1988 AND 1987 ANNUAL AVERAGES FOR MAJOR INDUSTRIES

CATEGORY	1988 AA	1987 AA	ACTUAL CHANGE	PERCENT CHANGE
TOTAL WAGE & SALARY EMPLOYMENT	1,152,300	1,100,100	52,200	4.7%
MANUFACTURING, TOTAL	214,300	206,200	8,100	3.9%
Durable Goods	155,900	149,200	6,700	4.5%
Lumber & Wood Products	68,700	68,000	700	1.0%
Other Durables	87,200	81,200	6,000	7.4%
Nondurable Goods	58,400	57,100	1,300	2.3%
Food & Kindred Products	24,100	24,000	100	0.4%
Other Nondurables	34,300	33,100	1,200	3.6%
NONMANUFACTURING, TOTAL	938,000	893,900	44,100	4.9%
Mining & Quarrying	1,400	1,400	0	0.0%
Construction	39,000	35,300	3,700	10.5%
Transp., Comm. & Utilities	60,500	58,500	2,000	3.4%
Trade	291,300	276,700	14,600	5.3%
Finance, Ins. & Real Estate	73,600	72,100	1,500	2.1%
Services	260,600	244,400	16,200	6.6%
Government	211,500	205,600	5,900	2.9%

all-time record for Oregon. One accompanying graph shows the rapid increase in payroll employment over the past two years.

A third graph shows the spread of employment growth between various major industry sectors. The industry titles which are abbreviated on the graph are "manufacturing", "construction & mining", "transportation, communications, & utilities", "wholesale trade", "retail trade", "finance, insurance & real estate", "services", and "government".

1988 saw employment in Oregon recording its strongest growth in a decade, and reaching its highest level ever.

Employment in manufacturing grew at a 3.9% rate in each of the last two years. Machinery (+1,300) and electrical equipment & supplies (+1,700) gained the most jobs in 1988, while printing & publishing and rubber & plastic products, two industries at record levels, each added 700. Only four of the 26 manufacturing industries for which data are published recorded employment losses, and in two of those (veneer & plywood and paper & allied products), the losses were at least partially due to labor disputes.

In nonmanufacturing, 44,100 jobs were added in 1988. Services (+16,200) and trade (+14,600) took the lead, but construction also recorded an excellent year with 3,700 new jobs, a 10.5% increase over 1987. Strength was widespread, with only railroads (-100) and banking & credit agencies (-100) recording employment declines.

In terms of the actual number of new jobs created, five of the top six industries came from services or trade. Business services (+4,300) topped the list, reaching employment of 48,700, more than double the level of ten years ago.

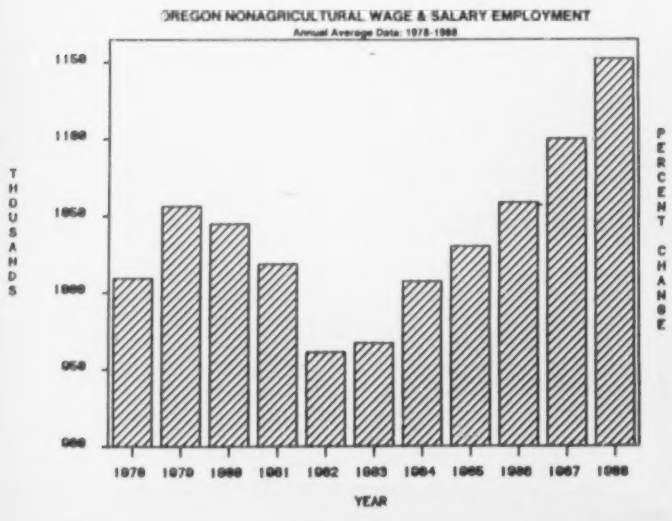
Hours & earnings statistics for 1987 and 1988 have also been revised, though revisions were small. Average hourly earnings in manufacturing was revised up one cent for 1987, and down four cents for 1988.

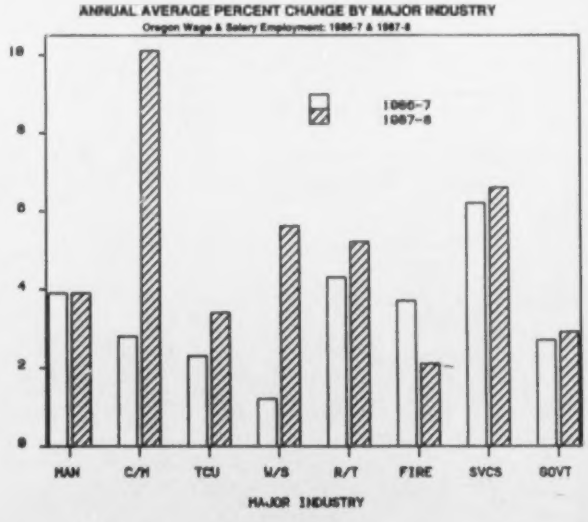
The statistics for manufacturing (production workers) are summarized below.

To summarize, 1988 saw employment in Oregon recording its strongest growth in a decade, and reaching its highest level ever. Strength was widespread, but a few worrying signs have appeared on the horizon, most notably relating to the important lumber & wood products industry. The momentum of 1988 is likely to create a strong start to 1989, and growth is expected to continue, but the rate of growth will certainly slow before the year is through.

(Any readers wishing to discuss the revised data further should contact the author at 378-2477.) □

	1988	1987	Change
Average Hourly Earnings	$ 10.56	$ 10.64	+$0.08
Average Weekly Hours	39.2	39.4	+ 0.2
Average Weekly Earnings	$413.95	$419.22	+$5.27





EMPLOYERS' CORNER

EMPLOYMENT ELIGIBILITY VERIFICATION- A NEW SERVICE TO EMPLOYERS

Dorothy Monnier

During this past year, we have shared information regarding Youth, Older Workers, Expropriation of Federal Unemployment Tax Act (FUTA) funds, Trade Adjustment Assistance, Targeted Jobs Tax Credit and the Quality Control Program.

We are accepting the opportunity, responsibility, and challenge of verifying the employment eligibility of all individuals referred to job openings.

Again, I want to share some exciting information that will be a GIFT to you, the employer. On April 1, 1989, the Oregon Employment Division will begin completing the Immigration and Naturalization Service's Employment Eligibility Verification Form (I-9). In the past, Oregon has not provided this service to employers. Providing such a service will be very beneficial to employers, but will have a considerable, added administrative cost to the Employment Division. This added service will:

- Increase the number of job orders.
- Alter the existing self-service/mail-in job applicant registration process.
- Automate the employee verification process.
- Generate a "Letter of Certification" to employers verifying the job applicant is authorized to work in the U.S.

THE FACTS:

From July 1987 through June 1988 (Program Year), the Employment Division:

- Registered 284,468 individuals
- Referred 148,047 individuals to jobs
- Received 127,580 job openings
- Placed 93,030 individuals in jobs

Due to the Employment Division providing this additional service to employers, it is anticipated there will be a 20% increase in placement activity. We are accepting the opportunity, responsibility, and challenge of verifying the employment eligibility of all individuals referred to job openings. We will not provide this service to employers who do not list their job openings with their local Employment Division office.

REMEMBER: Once we begin completing the Form I-9 on April 1, 1989, employers will not be audited by the Immigration and Naturalization Service if they use the Employment Division to fill their job vacancies.

Please become involved in your local Job Service Employers' Committee (JSEC) so that you have direct input into this process. Call Dorothy Monnier, State JSEC Coordinator, at 378-4446 for further details. □

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